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ABSTRACT

This manual contains guidelines for organizing small business programs in community colleges. Following an introductory discussion of the need for such a program both throughout the United States in general and in Illinois in particular, the role of the community college in facilitating small business development is examined. Guidelines are set forth for making decisions in various areas, including purposes/needs, clientele to be served, client characteristics, program objectives, program structure and scope, funding/support, staffing, recruitment and selection, evaluation, and program content. Addressed in detail in the remaining chapters are the following topics: participant needs, program content, advisory committees, needs assessment strategies, financing the program, promoting the program, program details, evaluating the program, and exemplary self-employment programs. Appendixes to the guide include such items as a program intake form, a bibliography on small businesses and entrepreneurship, a small business survey, a timetable for organizing management courses, a small business management seminar, and sample evaluation forms. (MN)

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Organizing Small Business Programs in Community Colleges

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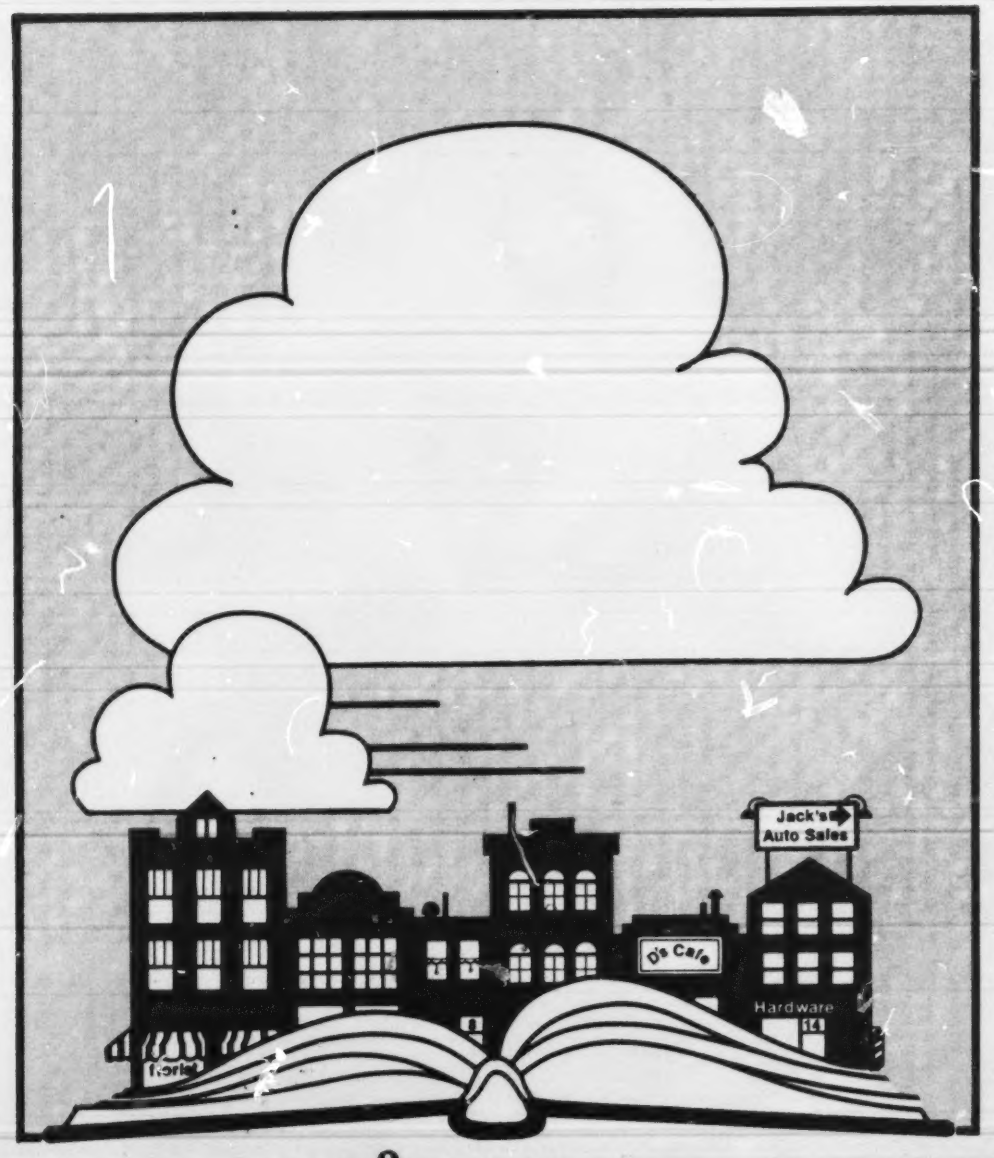

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Organizing Small Business Programs in Community Colleges

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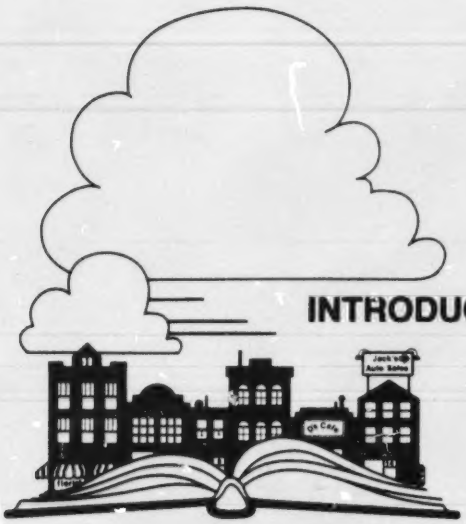
TABLE OF CONTENTS

	Page
INTRODUCTION	1
COMMUNITY COLLEGE ROLE	8
DECISION GUIDELINES	7
PARTICIPANT NEEDS	12
PROGRAM CONTENT	15
ADVISORY COMMITTEES	18
NEEDS ASSESSMENT STRATEGIES	20
FINANCING THE PROGRAM	27
PROMOTING THE PROGRAM	29
PROGRAM DETAILS	31
EVALUATING THE PROGRAM	35
EXEMPLARY SELF-EMPLOYMENT PROGRAMS	38
APPENDICES	40



INTRODUCTION

Statistics indicate that the small business sector is important to economic growth and that education, especially at the community college level, can enhance small business development in Illinois.

Of over 14 million business enterprises in the United States, only about 400,000 or 3% are big businesses. The other over 13 million enterprises make up the U. S. small business community. These small businesses provide about 50% of the nation's jobs in the private sector and produce almost 40% of the nation's Gross National Product (GNP). Further, a recent study indicated that small businesses (under 500 employees) provided 87% of the new jobs in the private sector while the very small firms (0-20 employees) produced 66% of all new jobs. The Small Business Administration (SBA) has estimated that either directly or indirectly small business provides the livelihood of over 100 million Americans.

Based on the 1977 Economic Census for Illinois, there are about 350,000 small businesses in the state which employ nearly 3 million people. Table 1 illustrates the breakdown of these small businesses. Collectively, these firms generated over $213 billion in business with

TABLE 1
ILLINOIS SMALL BUSINESS CENSUS (1977)

Business Type	Number of Employees	Firms (Statewide) Number	Percentage
1. Farms	110,000	105,000	30
2. Service	347,037	96,942	28
3. Retail	732,068	84,988	24
4. Wholesale	280,582	21,238	6
5. Construction	169,699	19,416	6
6. Manufacturing	1,287,000	18,260	5
7. Unclassified	4,182	2,812	1

the largest dollar volume being in the wholesale area. The small business community in Illinois is large, active, and has a substantial amount of diversity.

While the small business sector in the United States and in Illinois is viable, there are unique characteristics of this segment of our economy which deserves special attention. The following statistics highlight the need for this attention:

- Of over 14 million enterprises in the U. S., 2 million are corporations, 1 million are partnerships and about 11 million are sole proprietorships.
- Of the 14 million enterprises, 99.2% employ fewer than 100 persons.
- 80% of all small businesses fail within the first 5 years of their existence.
- Nine out of 10 small businesses fail because of poor management. Some specific reasons for failure include the following:
    - lack of planning
    - inadequate controls
    - poor accounting methods
    - inability to read and understand financial statements
    - inability to locate expert advice when needed
- Minorities form 17% of the total population, but own only 4.3% of all businesses and generate only .7% of all business receipts.
- Women make up 48% of the work force, but own only 4.6% of all businesses and generate only .3% of all business receipts.
- In Illinois, there are 350,000 businesses and 86% of them employ fewer than 20 persons.

In a recent nationwide study of small business owners, the following findings indicate some special needs of small business owners and managers:

1. The large majority of small businesses are less than 20 years old.

2. The majority of small business owners/managers have less than 15 years experience in management, have some post-high school education and have received some formal education in general business operations.

3. Customer relations and service was identified as a critical problem-solving area by an overwhelming proportion of the sample.

4. Personnel, competition, sales, marketing and promotion were frequently mentioned as critical areas in the success of a small business.

5. Specific problem areas mentioned as frequently troublesome include:

a. employee hiring, training and motivation
b. cash flow
c. sales forecasting
d. cost control
e. advertising and promotion

6. About one in three small businesses indicated that the amount of outside help currently available in dealing with problems was inadequate.

Finding six could be especially significant to community college staff interested in expanding their efforts in developing educational programs for small businesses within their districts.

Vocational Education and Small Business Development

In December 1981, the National Association of State Directors of Vocational Education stated that they were in full support of an economic plan to increase productivity and revitalize existing industry. For example, they suggested 1) supporting job-related entrepreneurial strategies, 2) maintaining close liaison with business and industries (especially with small firms), 3) providing technical assistance and support to companies for more innovation and improved productivity, and 4) adopting more effective and efficient methods of developing and delivering education and training through the use of modern communication technology, up-to-date equipment and curriculum development strategies. The development of self-employment activities is definitely a concern for community college involvement and is supported from the highest levels of government and education.

W. D. Baker, Executive Director of the Illinois 2,000 Foundation for the Illinois State Chamber of Commerce recognized the need for more extensive involvement of educators in providing education to self employed people in the state of Illinois. He suggested that a consortium of major universities in Illinois provide a small business productivity extension service across the state. He noted, however, that there might be difficulty in providing these educational services to the small business sector. He recognized that these services might have to start on a small basis in most Illinois communities which have populations of 10,000 and less. This statement appears to suggest that community colleges may be a means of providing these services.

COMMUNITY COLLEGE ROLE

A variety of programs can be implemented in Illinois to facilitate small business development. The purpose of this publication is to assist community colleges develop educational programs to meet the needs of current and future small business entrepreneurs.

Economic development in Illinois is a primary concern for most government and community agencies. The Illinois Department of Commerce and Community Affairs (DCCA) is devoting considerable resources to encourage the growth of the state's economic base. They are working with educational agencies, community groups and other governmental agencies to foster growth and expansion of new and existing private enterprises. Some of DCCA's efforts have been cooperative ones with various community colleges.

The Illinois State Board of Education/Department of Adult, Vocational and Technical Education (ISBE/DAVTE), has also begun to work with community colleges to improve the economic climate in Illinois. The High Impact Training Service (HITS) administered by DAVTE is one example of cooperation between DAVTE and community colleges. Most recently, the Illinois Community College Board (ICCB) has requested that each community college identify a person on campus as an "economic development contact person" to work with government agencies, community groups and businesses to help meet the education and training needs of new and expanding business firms.

While these examples of cooperation among community colleges and other agencies and groups in economic development are rather recent in the state's history, much of the emphasis has been concentrated on large manufacturing firms. Entrepreneurial education and training efforts geared toward small business needs must become an essential part of economic development since small businesses are such a vital and important part of the state's economy.

In 1977 the American Association of Community and Junior Colleges (AACJC) and the Small Business Administration (SBA) sponsored four conferences to develop strategies for serving the small business community. In 1980, this cooperative effort resulted in the establishment of 133 two-year colleges linked to 65 district management assistant offices of the SBA. However, a recent bulletin issued by the District office of the SBA in Illinois indicated that during the spring of 1981 only one of forty-seven programs was offered more than 90 miles from the Chicago SBA District office.

In October, 1980 the State Advisory Council on Adult Vocational and Technical Education (SACVE) in Illinois issued a report on entrepreneurship education and entrepreneurial development activities in Illinois. They stated "in the absence of coordinated activities and training efforts, the new entrepreneur is left to wander aimlessly from one source of information to another and is likely to experience little entrepreneurial development." The wealth of data to which the entrepreneur is exposed from a multiplicity of sources quickly becomes a jumble of confusing facts. Many persons who might otherwise have the potential for business success become frightened by the apparent complexity of it all.

One major problem is the identification of self-employment program objectives before a coordinated effort to serve these groups on a large scale can be initiated. Because of geographic uniqueness, local consumer demands, and local differences, the education and training needs of small businesses may be best served on a local basis.

In the 1980 study of entrepreneurial education efforts by SACVE, the following observations were made:

1. There has been a great deal of concern expressed about the availability of entrepreneurial training, especially for minority groups and women.

2. Those training activities that do exist are very popular, which suggests that if more were offered, more people would participate.

3. Entrepreneurial educational opportunities are not equally accessible throughout the state to all persons who might be interested.

4. Most of the available educational and training activities are concerned more with the sustenance and expansion of existing businesses, rather than with the preparation of new entrepreneurs.

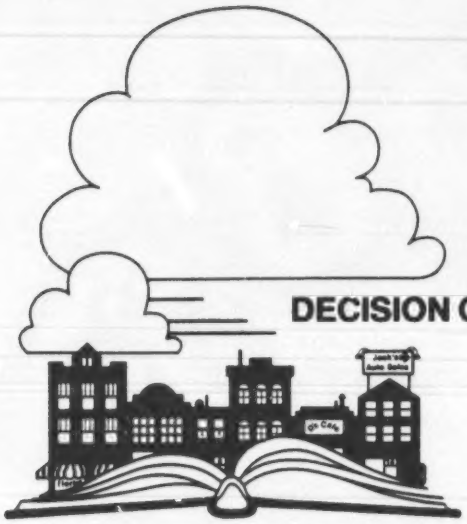
5. A good deal of entrepreneurial training is being provided directly by the academic community, much of it in cooperation with the Management Assistance Division of the SBA.

6. Entrepreneurial training for prospective farmers is not available to the same extent as it is for other small business aspirants.

7. In general, free forms of technical assistance are poorly publicized and regarded by most entrepreneurs who utilize them as being less useful than the instruction and orientation services for which they pay a fee.

8. The effects of entrepreneurial training are not carefully evaluated.

The above observations have implications for the state's 39 community college districts. Community colleges can have a significant impact on the job creation process by (a) helping prepare those people who are interested in self-employment and (b) by helping those already self-employed become more knowledgeable and increase the number of employees through successful business operations. Demand for trained workers comes with the initiation of new businesses and the expansion of existing businesses. When people become self-employed, they may hire employees who need additional education and training. Community colleges will contribute to the economic development of the state generally, and the college's community specifically, if they prepare people who have a future interest or a current investment in small business.



DECISION GUIDELINES

Many decisions have to be made before community colleges can help local small businesses develop and expand. Each decision area should be carefully considered before services and programs are established. The desire to help meet needs must be supported with sound implementation decisions for maximum impact.

There are ten decision areas which a community college must address in order to initiate self-employment activities with maximum potential impact. The following questions should be considered in terms of the local institution and community needs. The basic questions and supportive materials are outlined as a decision guide to provide guidance and initial information.

I. PURPOSE(S) OR NEED(S) — Why should the community college undertake small business/entrepreneurship training?

Common Responses:
- a) a service to the community that has direct impact as well as human benefit
- b) many graduates eventually become self-employed or work in small business

Supporting data:
- 1) many community college faculty were, or still are, engaged in small business activities
- 2) one of the few educational programs that can actually create jobs

3) activity will foster faculty and community working together

II. CLIENTELE TO BE SERVED — Who should be the primary clientele of the training?

Choices:

a) degree-enrolled students
b) adults in communities who are considering a business venture
c) small business owners in the community college district
d) a mix of the above groups

Sub-groups:

1) women
2) minority or ethnic group
3) disadvantaged
4) those in a specific kind of business (farming, foods, tourism, or kind of business/trade indigenous to area)

III. CLIENT CHARACTERISTICS — What are the social and educational characteristics of the primary clientele group?

Considerations:

a) history of success in schools or other educational endeavors
b) time available to attend class/program events
c) existing business management skills/knowledges
d) willingness to pay for program
e) firmness of the self-employment decision
f) unique group attitudes towards instruction or subject
g) availability of role models (Is ownership of a business "traditional" or "nontraditional?")

IV. PROGRAM OBJECTIVE — What should the program accomplish?

Considerations:

a) acquire basic knowledge of business practices and requirements
b) assist participants in making decisions to invest in businesses

c) increase profitability of existing business
d) provide awareness of personality needs and sacrifices necessary for success
e) help participants develop plans for starting and operating a business
f) awareness of who will help solve problems

V. PROGRAM STRUCTURE AND SCOPE

Given the program objectives, how should the program be organized?

Considerations:

a) one course, 36 to 45 contact hours
b) series of short courses; 2 or 3 sessions on each topic
c) a multi-year program that consists of a series of courses 10 weeks or longer that build skill and depth
d) credit bearing, credit option or non-credit
e) evening offering, summer, day program elective
f) integrated degree program

VI. FUNDING/SUPPORT

How will the program be supported the first year and after?

Considerations:

a) college support of staff coordinator supplemented by fees from participants
b) grant support first year, self-supporting later
c) business/community contributions
d) instructor and consultants volunteer time
e) regular continuing education tuition
f) college community service budget

VII. STAFFING

How will the program be managed and staffed?

Considerations:

a) continuing education division
b) business department
c) college/community organization co-sponsorship

d) college staff member as coordinator
e) college staff members as instructors
f) instructors and/or consultants from business community (banker, lawyer, accountant, etc.)
g) special consultants from agencies such as SCORE, SBA, OMBE, Chamber of Commerce

Staff Expertise:

a) credibility with participant groups
b) first-hand knowledge of owning a small business
c) commitment/interest in subject
d) instructional skills
e) status of program staff with college faculty

VIII. RECRUITMENT AND SELECTION

How will potential students be contacted?

Considerations:

a) public service messages on radio and TV
b) flyers, posters, handbills
c) mail notices to small business persons
d) newspapers
e) word-of-mouth (former students, social organizations, etc.)
f) business and community organizations and agencies
g) referrals from helping agencies (SBA, Chamber of Commerce, etc.)

Should enrollment in program be selective?

Considerations:

a) persons in business now
b) those who made a firm decision to go into business
c) course prerequisite (if degree program)
d) referral or recommendation
e) other criteria on basis of need or success probability

IX. EVALUATION

What criteria will be used to assess effectiveness of program?

Considerations:

a) instructor judgment of class work produced
b) participant opinions of satisfaction with instructor(s), content, location, scheduling, instructional materials
c) evidence of improved business practices
d) numbers of participants who go on to business ownership
e) numbers of participants who do not go on to ownership based on better informed decision-making
f) longitudinal history of participants' business success
g) cost/benefit analysis using criteria (c) and other criteria above

X. PROGRAM CONTENT

What should course content include?

a. Overview: minimum knowledge and skill depth with maximum scope of topics and resources

b. Concentration: maximum individual acquisition of knowledge and skills with selected topics

c. Topics usually covered:

1. Understanding financial statements
2. General business management principles
3. Marketing and customer relations
4. Taxation and law
5. Staff relations
6. Cash flow/capitalization
7. How to start a business
8. Personal motivation/achievement
9. Advertising - public relations
10. Insurance
11. Recordkeeping
12. Salesmanship
13. Government procurement
14. Security and prevention of fraud
15. Inventory control
16. Use of Microcomputers

PARTICIPANT NEEDS

Small business practitioners and prospective entrepreneurs have unique educational needs. They desire answers, solutions and assistance which have immediate applicability. Community colleges have a responsibility to identify and respond to these needs.

Educators must understand adult learners--what makes them different from the young learner. Adult learners:

1. Have more experience (than young learners) and a different quality of experience to contribute to the learning situation.

2. Are more ready to learn different things than the young learners because they face different developmental tasks (e.g., parenthood).

3. Tend to be more autonomous, and, therefore, less comfortable in a dependent role.

4. Are usually interested in the immediate usefulness of new knowledge.

Adult learners appear to be more critical of the teachers and teaching methods and are reluctant to accept usual classroom practices; they don't like theory and principles, or textbook assignments, and are often weary after a hectic day so that learning becomes difficult.

There is reason to believe that the hesitancy of many adults to take part in educational programs is in part due to a sensitiveness to ridicule when they come to learn something which they feel they should already know. Adults may learn much less than they might

because they underestimate their learning power and because of fear of unpleasant attention and ridicule. Instructors may find that a necessary part of their job is to restore and increase the confidence of adult learners.

The first requirement for adult learning is that the adults want to participate in the learning process. There must be a problem which they desire to solve, an obstacle with which they wish to deal, or a skill which they wish to gain. All learning must have a purpose. Adult learners usually come to class sufficiently motivated; they have a purpose in coming. Mature adults who have admitted their need for education and training and have offered their time, money and effort to satisfy that need require no external compulsion. What is needed is to hold out hope for success to them.

An important factor is the experiencing of success. When adult learners satisfy a need, are commended by the teacher or their peers, and have a general feeling of accomplishment, they will believe that their efforts have led to success. Adult students need to accomplish something tangible at the first meeting and this satisfaction should continue every meeting thereafter. What is learned must be direct and usable; deferred results give little satisfaction to most adults.

The job of the instructor becomes one of organizing learning activities in a skillful and effective pattern. Good learning will be organized around undertakings which seem real and compelling to the learners, which confront them with significant challenges, and which lead to deeper insights, more discriminating attitudes, and more adequate skills. The learning environment must provide abundant and varied stimulation, numerous opportunities for personal achievement, guidance without domination, and tasks that are challenging without being frustrating. The primary needs of adult learners include:

1. Learning must be problem-centered. For the most significant kinds of learnings that adults do, the problem must be recognized as a problem for the learner, not a problem of the teacher. When learners see real problems, they are motivated to seek solutions. The teacher cannot 'give' another person a problem. In the learning situation the problems must arise in the experiences, perplexities, doubts, and thinkings of the learner. The teacher's obligation is to provide situations in which learners see a broad range of problems and from which they gain the ability to seek and formulate their own problems.

2. Learning must be experience-centered. The problem for the instructor, who develops the climate for learning, is to help provide the optimal kinds of experiences that will relate to the problems of the learner. Learners must gather data for their own problems.

3. Experience must be meaningful to the learner. The experience that bears upon the problem must be suited to the learners' capacity to perceive, their age, their interests, their readiness, and their ability to understand. Unless learners see the relevance of the data to their problems, they will be unable to use the data in developing solutions.

4. The learner must be free to look at the experience. Learners learn from others in social situations. The learner who is emotionally and psychologically free to look at experience is ready to start on the process of acquiring the necessary behavior with which to learn and to grow.

5. The goals must be established and the search organized by the learner. Several experiments indicate that the active learner is more effective than the passive learner. In order that problems be problems to the learner, it is significant that the goals of the broad learning situation be set by the learner.

6. The learner must have feedback about progress toward goals. Some indication of success or failure, some frame of reference for determining adequacy of problem solution, some reality factor with which to assess one's achievement against one's level of aspiration, some knowledge of success or failure--all are necessary in the functional feedback process.

Information about specific learner needs can be obtained by using a form at the first class session similar to the one in Appendix A.

PROGRAM CONTENTS

Community colleges can offer a variety of services and programs. Content decisions will determine the scope of activities pursued by the college. Therefore, the content is very significant to the potential involvement of the small busines community with the college.

Major content questions relate to 1) the highest priority subjects relating to business ownership/management and 2) the scope and depth of coverage, that is, acquisition of skills and knowledges versus understanding the importance or need to acquire or hire others having various levels of skills and knowledges.

Priority Topics. A recent survey of experienced small business program coordinators indicated that some or all of the following subjects or topics should be included in the curriculum:

1. Understanding financial statements
2. General business management principles
3. Marketing
4. Taxes
5. Staff relations
6. Cash flow/capitalization
7. Planning your own business
8. Personal motivation/achievement
9. Advertising and public relations
10. Insurance
11. Recordkeeping
12. Cost accounting
13. Government procurement
14. Security and prevention of fraud
15. Inventory control
16. Business law

17. Salesmanship
18. Customer relations
19. Use of microcomputers

Some of the above topics can be taught within the format of one semester courses. The students are expected to gain minimum skill level in certain topics such as recordkeeping and cash flow management. While some instructors approach each topic as a separate task related to business ownership, there is a growing trend of relating the topics more closely to real or anticipated student ventures through the development of detailed plans and worksheets for their personal businesses. The course results in a personalized notebook that is a basic reference and business plan used by students in the early stages of their business. If students do not have a specific business firmly in mind, they choose one to use as a simulation. The content focus is on management. The individual student must bring the trade knowledge to the simulated experience.

Courses for existing business owners are often planned to be more skill oriented for specific topics. Priority topics usually include: taxes, specialized bookkeeping procedures, advertising or special topics such as government contracting and changing legal requirements. This curriculum approach acknowledges the needs/awareness stage and attempts to build skills in more depth. Business owners select the topics that are of specific interest to them.

A variation that combines scope and depth is a course designed for business owners of a specific category such as food stores, photography stores or small retailers. This approach requires a service area with sufficient numbers of similar businesses to provide sufficient enrollment.

Courses for potential business owners (and those for a specific minority group or for women) should include a self-awareness, self-potential or other counseling-oriented component. Many minority and women students feel they face additional barriers or problems in the business world. Opportunity should be given to bring out these feelings and discuss strategies for dealing with them, perhaps in special seminars or workshop sessions. Community support groups can be useful in addressing these issues and contacts made in class can lead to productive interactions in the future.

Courses for potential business owners should devote time to the development of owner readiness (self-awareness) and an examination of personality attributes, family considerations and other needs that will impact on the success of business ownership. Success requires thorough trade knowledge, management skills and personal attributes that include risk-taking, judgment, drive to succeed, a 60 to 80 hour workweek, and personal and family sacrifices that accompany such a lifestyle. Examples of the kinds of questions a potential entrepreneur needs to address are presented below:

Can I make decisions?
Have I identified the areas where decisions are required?
Am I a self-starter?
Am I willing to take calculated risks?
Can I be away from home almost every day and evening?
Will my family help or hinder?

Depth of Instruction. The criterion of sufficiency is specific to the student and the program. The generally used yardstick of minimum competency appears to be when the business owner knows what specific skills or knowledges to employ and knows enough about the performance of the employees to judge effectiveness. One business person stated it succintly: "Knowing when to get a new tax accountant is as important as knowing when to change product lines."

Instructional materials. There are many materials available and most were written for credit-bearing elective courses in business management. A listing of materials is provided in Appendix B. Nearly every program can use the Small Business Administration publications, some of which are free upon request. The new SBA series "Business Basics" can be used as class modules, as departure points for locally developed materials or as a basis for teacher produced materials.

ADVISORY COMMITTEES

Advisory committees can play an essential role in establishing small business programs. Properly utilized, they can provide advice and direction concerning course content, instruction methods, guest speakers, reference materials, publicity and program evaluation.

An advisory committee should be made up of local leaders (business and industry representatives) who are interested in the community's economic welfare. To be representative of the business community, the committee might include a banker, lawyer, small business owners, a representative of the local chamber of commerce, an accountant, faculty and administrators from the community college and a representative from the Small Business Administration. Another person who may be asked to work on the committee is the business editor or a reporter from the local newspaper. This person can be helpful in publicizing the program and in helping preparing brochures and other announcements.

A committee composed of ten or twelve members is large enough to be representative but small enough to be workable. The duties of the advisory committee may vary, but would generally provide the following:

1. Suggestions of subject matter.
2. Suggestions for potential instructors and speakers.
3. Suggestions of time and place for classes or meetings.
4. Suggestions of ways of publicizing programs.
5. Help in developing or securing mailing lists.
6. Help in developing and conducting community surveys.

Appendix C contains a statement for the advisory committee members which can be reproduced for informational purposes.

To stimulate discussion, the coordinator should have some specific proposals regarding topics, speakers, and agenda when the committee meets for the first time. The number of meetings should be kept to a minimum. In some cases, it may be feasible for the program coordinator to meet with an individual member or a sub-committee instead of the full committee.

At the first meeting of the advisory committee, the coordinator should remind the members of the economic benefits which small business training offers their community. The agenda should be "task-oriented". A primary function of the advisory committee is to provide advice and assistance to the community college.

USES OF ADVISORY COMMITTEES

According to a poll of 70 educational institutions, advisory committees helped small business programs in the following ways:

Selection of subject matter	79%
Suggested names of speakers	69%
Helped with promotion	68%
Suggested a time for class meetings	67%
Suggested a place for class meetings	46%
Other (Furnished mailing lists, evaluated sessions, conducted a community survey, etc.)	9%

Discussions at the committee meetings might include: course content, meeting place, method of presentation, names of possible speakers, instructional methods, preparation of reference materials, publicity for the program, registration fees, ceremonies and certificates, and evaluation of the program.

Advisory committee members are busy people. To save time, it is advisable not to cover too many details in one session. At the same time, it is advisable not to have too many sessions. If the committee is large, the coordinator may appoint subcommittees or working groups for specific tasks such as compilation of a mailing list or the preparation of publicity materials.

NEEDS ASSESSMENT STRATEGIES

A needs assessment is the necessary first step toward identifying and providing education programs for the small business community. Needs assessments form an initial bond between the community college and the small businesses within its district. Cooperation at this stage will help insure successful programming in the future.

Determining the Needs

Successful small business programming will be the result of a formalized, systematic needs assessment process. This will take the "guesswork" out of the small business programming process and will provide the community college with an information base to:

A. serve as a mechanism for identifying business interests, needs and concerns;
B. provide a way to identify a network of key people in the community who will serve as resource people to the college;
C. serve as guidelines to identify future small business programming objectives and priorities.

Small business needs assessments might be conducted once a year. Activities underway can be used as building blocks for future programs. New trends may be emerging which produce new needs to which the college should respond.

A series of procedures must be repeated during the life of the small business programming cycle. A needs assessment is followed by establishing program priorities determining objectives, budgeting, program operation, evaluation and the development of a second more refined and sophisticated needs assessment. Then, the planning cycle is ready to repeat itself during the following year.

There are eight steps which all needs assessments should follow:

STEP 1 - Identify Staff Roles
STEP 2 - Develop a Common, Basic Language
STEP 3 - List Concerns and Goals
STEP 4 - Determine the Needs
STEP 5 - Rank the Needs
STEP 6 - Set Priorities
STEP 7 - Examine Feasibility of Meeting Needs
STEP 8 - Plan and Offer the Program

These eight steps are the central core activities for the following five different needs assessment strategies:

1. KEY INFORMANT
2. ADVISORY COMITTEE
3. COMMUNITY INDICATORS
4. FIELD SURVEY
5. USER FEEDBACK

Each of these strategies will be defined, steps for assessing needs listed, and strengths and weaknesses of each strategy identified.

1. KEY INFORMANT

Definition - The key informant approach gathers information from those who are in the best position to know small business needs. Types of key informants are: local bankers, chamber of commerce directors, economic development specialists, and U. S. Small Business Administration personnel.

Steps in Assessing Needs

- Identify staff roles
- Develop a common, basic language
- List concerns and goals
- Construct an interview schedule
- Develop interview instructions
- Contact key informants for meetings
- Conduct interviews
- Summarize and code responses
- Send thank you letters to informants

A. Strengths of This Approach

- Simple and straight-forward
- Inexpensive (use volunteers to collect data)
- Clarification and amplification of respondent answers
- Excellent opportunity to identify resource people

B. Weaknesses of This Approach

- Key informants reflect a group which is biased by their organizational perspectives
- Unstructured data are difficult to analyze
- Time consuming to conduct interviews

2. ADVISORY COMMITEE

Definition - This strategy relies on individuals who are asked to assess the needs of the local small business owners. Membership on the advisory cmmittee, unlike key informants, should be from the local small business community. These individuals are brought together face-to-face and are asked for their input through a structured group process.

Steps in Assessing Needs

- Identify staff roles
- Develop a common basic language
- List concerns and goals
- Identify appropriate group consensus process
- List key questions to be considered
- Develop and disseminate detailed agenda
- Identify form to record group data and designate recorders
- Conduct meeting and collect data
- Send summary to each participant

A. Strengths of This Approach

- Easy to arrange
- Inexpensive
- Opportunity for broad grassroots input
- Advocate group for future activities is identified

B. Weaknesses of This Approach

- Careful planning prior to meeting usually not done
- Meeting must be skillfully conducted

- Information difficult to code
- Unrealistic expectations develop that all suggestions can be implemented

3. COMMUNITY INDICATORS

Definition - Valuable needs assessment data can be gathered by looking at key characteristics of the small business community. Data are available in the community on the number of small businesses, number of employees classified by the Dictionary of Occupational Titles, types of businesses classified by the Standard Industrial Classifications, geographical location of businesses, age-maturity of small businesses, mortality rates of area businesses, educational levels of the employees, and availability of small business training opportunities. These data are brought together in a small business Profile Sheet which helps the staff identify areas of focus (see Appendix D).

Steps in Assessing Needs

- Identify important community indicators
- Identify sources of data (chamber of commerce, census, local banks, etc.)
- Develop data profile layout
- Collect data
- Summarize and analyze data

A. Strengths of This Approach

- Vast pool of existing data is utilized
- Low cost to secure data
- Trend information rather than one-shot survey is used

B. Weaknesses of This Approach

- Data are indirect indicators rather than direct from business people
- Data tend to be global rather than specific
- Difficult to extract programming inferences
- Information may be out-dated

4. FIELD SURVEY

Definition - This is the most common, and over-used, approach to needs assessment and is based on the collection of data from a sample or entire population of the small business community. These data are collected through use of a mailed questionnaire composed of items designed to elicit information about interests, needs and concerns of business owners, (See Appendix E).

Steps in Assessing Needs

- Identify staff roles
- Develop a common basic language
- List concerns and goals
- Determine sampling procedure and mailing list
- Determine question format and response categories
- Write questions and pre-test survey instrument
- Determine non-response strategy
- Conduct survey
- Code data
- Conduct second mailing
- Conduct non-response follow-up
- Summarize data

A. Strengths of This Approach

- Scientifically valid
- Produces structured response data
- Collection of data from a wide geographical area
- Easy to conduct

B. Weaknesses of This Approach

- Expensive
- Low response rates
- Incomplete information on survey form
- Clarification and enhancement of respondent answers not possible
- Difficult to write clear statements

5. USER FEEDBACK

Definition - Local business people participating in the college's current or past programs provide a valuable needs assessment resource. These observations can be obtained by providing users with a structured reaction form on which they can evaluate current activities and identify other activities they would like to take. See Appendix F for sample reaction form.

Steps in Assessing Needs

- Identify activities for small business target groups
- Develop reaction sheet
- Pre-test reaction sheet
- Develop instructions for in-class administration
- Collect data
- Process and summarize data

A. Strengths of This Approach

- Easy to obtain data
- Low cost
- Evaluation data is basis for program improvement
- Structured data collected

B. Weaknesses of This Approach

- Program bias occurs by asking same users each time
- Limited time to administer
- Limited data collected
- Small numbers in sample

Developing A Needs Assessment Profile

Analyzing Results. Two key decisions guide the analysis of data. The first basic decision is to determine how the data will be tabulated and displayed. Generally, needs assessment data lends itself to frequency tables and measures of central tendency (means, medians and modes). Depicting the data in pie charts, line chart, bar graphs or in rank order helps the researcher see relationships.

The second analysis decision is to determine intensity of the needs. No statistical formula or rule of thumb exists to help make this important decision. When 38 percent of the sample say they want training in recordkeeping, what in fact can the researcher infer? Would 38% of the local business community attend? Or, would half of that number come? The use of multiple indexes (using more than one needs assessment strategy) is a way that the researcher will be able to decide what is actually needed.

Communicating Key Results. Key results should be summarized and recommendations developed. To insure that the needs assessment data are used, the following strategies should be implemented:

1. Utilize a task group of key decision-makers and the Advisory Committee to help with development of recommendations.

2. Present key results in attractive format to the Advisory Committee and the local chamber of commerce.

3. Present key findings within the context of community framework. Do not use results to produce radical changes.

4. Present findings and recommendations relative to what other area organizations are doing.

5. Develop strong consensus of results among powerful community groups. Have these groups provide endorsements and support.

6. Stress pilot-testing of new program activities rather than full-scale implementation.

Revision of Process. Once the needs assessment has been completed and the results implemented, the community college is ready to review, evaluate and revise the process. Subsequent needs assessment will be more specific and more sophisticated once the program has been in operation.

An on-going program should be fine tuned and minor adjustments should be made to program objectives and processes. Only through careful monitoring of on-going needs assessment through the five proposed strategies will small business programming remain up-to-date and meet local needs.

FINANCING THE PROGRAM

Determining the costs of small business programs includes the need to review salaries, promotional expenses and materials. In addition, it is important to determine sources of income, the size of enrollment (credit courses may generate state aid), registration or tuition fees and contributions by business or trade associations.

"Who pays for the small business programs?" To find the answer, questions to consider include:

What will the program cost?
How large an enrollment may be expected?
What registration fee will be acceptable to local business people, yet will meet the expenses?

Principal Cost Items.

Principal cost items include salaries, promotional expenses and materials. These expenses vary from college to college so that it is difficult to identify exact costs. Some coordinators prepare a budget estimate of expenses and expected income. The elements of the cost of a program include:

Personnel. Personnel costs may include salary, fees or honoraria for instructors, and travel and per diem allowances. Depending on the policy of the community college, coordinators may or may not be remunerated (in addition to their regular salaries) for conducting or coordinating special courses.

Special lecturers brought in on a one-time basis may receive only an honorarium for travel and out-of-pocket expenses. Many local and out-of-town business people and trade association officials donate their services.

Promotion. Preparation and reproduction of brochures and letters; postage; and news media advertising, including newspapers, radio, and television, are items of promotional expense.

Materials. The cost of materials for instructors and students varies greatly. Many colleges use the Small Business Administration's free management assistance publications as handouts for the participants. Some also buy the SBA for-sale booklets from the U. S. Government Printing Office. Other institutions furnish notebooks, reprints of articles, and outlines of course lectures. Film rentals, as well as other instructional material costs, should be considered in developing the program budget.

Sources of Income.

A principal source of income is from the registration or tuition fee paid by the participants. Credit courses also may generate state aid. Some colleges offer the courses as a public service, with little or no charge to the participants.

To determine the registration fee to be charged, the coordinator should add up all expected income, such as contributions by businesses or trade associations. This amount should be deducted from the estimated expenses. The remainder should be divided by the anticipated enrollment. The result is the minimum registration fee. A margin may be added for budget error and surplus.

Working out a tentative budget helps to estimate the registration fees which can be discussed with the advisory committee. The committee may be helpful in seeing that the proposed fee is acceptable to local business people. The fee should be reasonable so that it encourages owner-managers of even the smallest firms to attend, as well as those persons who anticipate becoming self-employed. On the other hand, if the fee is too low, some business people may not enroll because they believe the instruction will be of poor quality.

PROMOTING THE PROGRAM

The success of a program depends on the good timing of its promotional campaign through direct mail, newspapers and newsletters, personal contacts, radio and TV, public talks or other media. The type of program will dictate the direction of the public relations effort.

The best made plans often go astray, especially when they aren't promoted. Potential participants have to be told about small business programs, as well as sold on them, if they are to enroll. Inadequate enrollment can usually be traced to inadequate promotion. When the coordinator spreads the word for a specific program (such as a course) timing, media, and direction are important.

Timing

Training should be scheduled far enough in advance to allow sufficient time for promoting. The time table in Appendix G includes a suggested schedule of publicity in a course program. A minimum of 3 weeks should be allowed between the first mailing of announcements and the date a course begins.

Promotional Media

The coordinator has a variety of media available for promoting small business management programs. The following have been used successfully:

Direct Mail. The most popular form of direct mail is an attractively printed brochure. Detailed information on preparation and distribution of brochures is contained in Appendix H.

Letters from the coordinator, SBA regional director, or the advisory committee may also be used. Mailing lists may be prepared

by the college from business lists and directories. Local cooperating business associations and the SBA also have lists of small businesses which may be used.

Newspapers. Local newspapers have cooperated in giving news coverage to new programs. The initial story can be the announcement of the advisory committee meeting and the proposed data for the first course. As plans shape up, additional news stories can provide information on registration, starting date, and speakers. A story of the closing exercises may encourage people to participate in the next program offered.

Newsletters. The newsletters of trade associations and organizations, such as chambers of commerce, are an excellent means for reaching a specialized group of business people.

Personal Contacts. The coordinator and the advisory committee members may telephone or visit business people and ask them to participate in the training.

Radio and Television. Some local stations furnish time for spot announcements as a public service.

Public Talks. Announcements may be made at meetings of local business, trade associations or community groups.

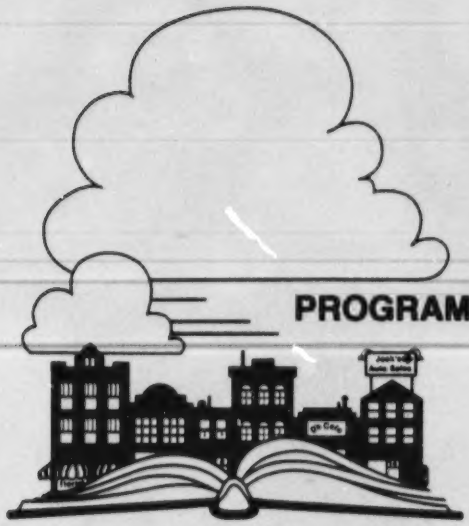
Other Media. Courses may be publicized through paid announcements in newspapers and on radio and TV. Banks have included announcements of courses with their statements or other brochures to their customers.

It is that coordinators make certain that every appropriate form of promotion is used to the best advantage.

Directing the Promotion

The type of program being offered will dictate the direction the promotion will take. For instance, the training may be directed toward a heterogeneous group, such as existing and future owner-managers from a variety of businesses. Promotion for this group should: (1) stress the fact that management problems are similar as long as they are at the administrative level, and (2) point out the advantages of gaining insights from the problems and solutions of other small business people.

When the training is offered to a special designated group, such as a group of manufacturers, or a group of appliance dealers, the promotion can be pinpointed to that group's needs. Mailing lists from trade associations and local business groups will help the coordinator in directing mail to a selected group.



PROGRAM DETAILS

Choosing instructors, scheduling meetings and selecting instructional materials may appear routine and insignificant. These program details, however, often impact on the success of the educational activity.

The most highly promoted education program will not succeed unless it is planned in detail. The preparation by the coordinator should include: (1) scheduling the program well in advance: (2) choosing the instructors with care; (3) supplying instructors with the necessary information and materials in sufficient time for their preparation; and (4) arranging for the physical accommodations of the participants.

1. Choosing Instructors

When possible, the coordinator should know the capabilities of each instructor or speaker. The needs of the audience and the objectives of the program should be emphasized to the instructors. In selecting speakers, emphasis should be placed on knowledge and experience in that particular topic.

2. Briefing the Instructors

Some of the speakers may have little or no experience as instructors. They may be business people competent in a specialized field. They may need help in preparing and presenting a lecture even though they may be excellent after-dinner speakers. For example, they may need suggestions on how to encourage audience participation even though they are accustomed to giving short briefings to their own associates.

3. Selecting Educational Materials and Equipment

Detailed preparation insures that the necessary materials will be on hand when needed. The coordinator should reserve the visual aids, films, and television tapes well in advance of the dates they will be needed by the instructors. In addition, the coordinator should be sure that equipment--such as projectors, screens, and sound apparatus--are in operating condition when needed.

4. Achievement Ceremony

Some type of recognition of achievement is important for the continued success of a small business management program. A certificate of recognition as shown in Appendix I presented in an appropriate setting can provide motivation for further achievement. With some planned publicity for the event, potential participants may be motivated to attend future programs.

5. Scheduling

Allowing sufficient lead time in planning the program is vital. Appendix H illustrates an example of lead time for a small business course. A schedule helps determine that details are handled at the proper time. Factors to be considered in planning the program are the month, day of the week, and time of day the sessions are held.

a. Day of the Week

1) What days are local businesses open for late shopping?
2) What days are preempted for other activities of business people such as chamber of commerce meetings, and other group business activities?
3) What days are used by local fraternal groups?
4) Are certain days set aside for civic club luncheons or dinner meetings?

b. Hours of the Day

Morning. In determining the hours for a one-day conference or workshop, certain questions must be answered. For example:

1) When does the morning business rush begin?
2) Should the meeting hour be set enough in advance of the rush hour to allow sufficient travel time for business persons to get to work?
3) Is there a day when most retailers open later than usual?

Evening. Evening sessions are often easier to arrange than day-time sessions. The main considerations in determining beginning and ending time for evening sessions include:

1) What time will permit the business people to close their offices, eat, and arrive at the meeting place without undue haste?
2) Considering the length of the class sessions, what closing hour will permit the participants to return home at a reasonable hour?

c. Starting Month

1) Courses. September and February are the best months for starting courses. Based on statistics available for a recent typical year, the greatest number of courses were started in September with February running a close second. March, January, October, and April, in this order, were the next most popular months. Summer months are generally not the best time to begin a management program because of vacations. Late November, December, and early January are times of heavy business activity, particularly for retailers, and should be considered carefully in determining starting dates. Training should begin early enough during the fall season to avoid sessions running into Thanksgiving and Christmas holidays.

2) Conferences. The coordinator has more freedom in scheduling conferences than courses because of the time element. A conference takes only one day (or less) of a small business person's time. According to statistics for a typical year (see following chart), the largest number of conferences was held in November. April, February, and January were the next most popular months.

3) Workshops for Prospective Business Owners and Problem Clinics. Workshops and problem clinics are similar to conferences as far as scheduling is concerned. Because of the broad appeal, a workshop for prospective small business owners is usually the most effective program to impress on the local community the value of management training. Appendix J contains an agenda for this type of workshop.

d. Location

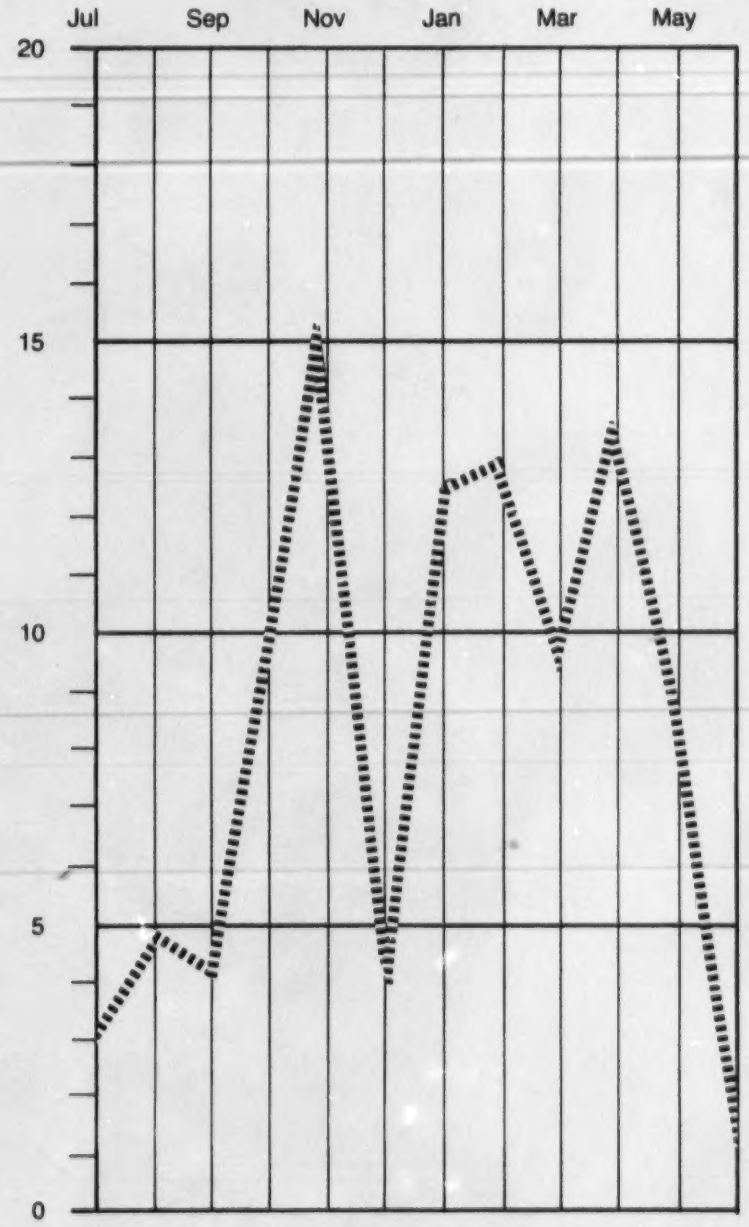
The location for the training should be convenient and accessible to the majority of the participants. Adequate parking should be available in the vicinity at the time of the meeting.

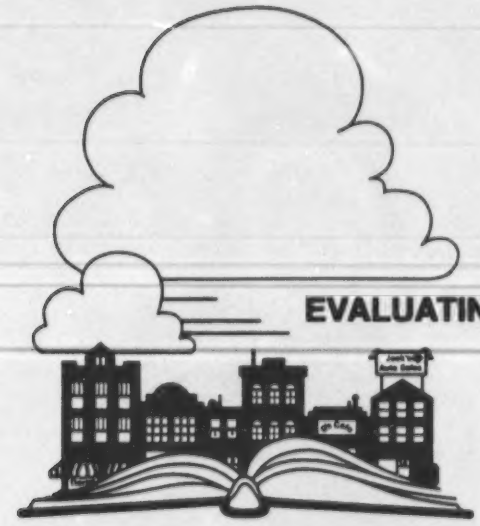
Most courses are held in classrooms. Many hotels, restaurants, churches, and business associations have rooms that are suitable for educational sessions.

MONTHS CONFERENCES WERE HELD

(Expressed in percentages of total sample)

The total sample for the following statistics was based on 466 conferences.





EVALUATING THE PROGRAM

Every service or program offered to local small businesses by a community college should be evaluated. Formal evaluations will insure that the mistakes will not be repeated and that successes will continue.

A question that plagues educators is: "What are the results of our efforts?" Instructors and coordinators of small business programs are no exception. They need answers to questions such as: "Did the program meet the expectations and needs of the participants?" and "Is there a need for additional education?" To make such a determination, evaluations must be obtained from those who participated in the program.

The instructor may wish to set aside the last 15 minutes of the final session of a program to obtain evaluations (Appendix K and Appendix L). Each participant should return the evaluation before leaving the classroom, because experience has shown that few, if any, mail in the evaluations.

The most frequently used tool is a questionnaire. The appendices show sample formats for evaluating small business management courses and seminars. The need for evaluation of one-shot seminars or workshops is apparent as is the need for evaluation of a small business management credit course. The presenter (instructor) should be evaluated along with the materials and activities associated with the course.

When the community college offers a certificate or degree program in the area of small business management, the entire program should be evaluated on a regular basis. The Locally Directed Evaluation (LDE) materials developed by the Illinois State Board of Education/Department of Adult, Vocational and Technical Education contain

a number of evaluation activities applicable to a Small Business Management Program. A few LDE activities which might apply include:

1. Student Evaluation of Instruction
2. Student/Employer Follow-Up
3. Assessment of Instructional Materials
4. Assessment of Student Attainment of Objectives
5. Analysis of Community Resources
6. Cost/Outcome Analysis

Since most community college small business management educational activities are not-for-credit workshops and short courses, evaluation of these discrete offerings is important. These evaluations can identify the need for expanded offerings which might eventually include credit courses and certificate and/or degree programs. Evaluation would then lead toward new course/ program identification, development and implementation.

Additional Activities

"Strike while the iron is hot" could be the title of this section. Small business owners should be encouraged to continue their quest for self-improvement. If the basic management program has aroused the interest of the participants, the last session is a good time for the coordinator to encourage them to continue their education. It is a good time to tell them about any long-range plans for additional programs. They can also be told about ways in which they can keep abreast of new small business developments.

Advanced Education. Plans for followup or additional training should be announced at the conclusion of the initial program. If none is planned, the coordinator should review the evaluations quickly to see who is interested in additional education. Some advanced educational experiences can then be organized and a ready-made mailing list is available for recruitment efforts.

Depending on the preferences for time indicated on the questionnaires, the advanced education may have to be given at different nights and hours. Preferences expressed by the participants may also mean varying the approach to certain subjects in the future. In offering advanced education, the coordinator and advisory committee should work together to determine the broad topics that make up a well-balanced management development program for their community.

Alumni Associations. "Alumni" associations offer an opportunity for encouraging participants to continue their management training. Such associations are made up of graduates of administrative management courses and have been formed in some communities. The form of an association is not as important as the purpose. The purpose is to perpetuate interest in new developments in business policies and practices.

In one city, a group graduating from the first SBA-cosponsored course formed an alumni association. The members adopted their own bylaws and began to hold monthly dinner meetings. After the meal, members would present their problems for discussion by the group. This alumni association eventually evolved into an independent small business association. The latter's purpose was the advancement of management training for association members.

EXEMPLARY SELF-EMPLOYMENT PROGRAMS

Community colleges throughout the nation have provided exemplary small business programming, ranging from one day seminars and non-credit courses to degree programs.

Most successful community college programs have been able to adapt to the local needs of their community while using the talents of the educators who implement the programs. An award for an "outstanding vocational education program" was give in small business management to Lane Community College in Eugene, Oregon. Their adult education program included a three-year sequence of courses and experiences regarding small business. This program was similar to the Minnesota model developed by the Division of Agricultural Education and the Department of Vocational Education at the University of Minnesota. This program is designed to develop decision making and self-analytical entrepreneurial traits in small business owners.

Another unique three year small business program is offered at Lake Region Community College in North Dakota. This program includes an analysis of small business needs and culminates in a small business reorganization. Appendix M contains information on this program.

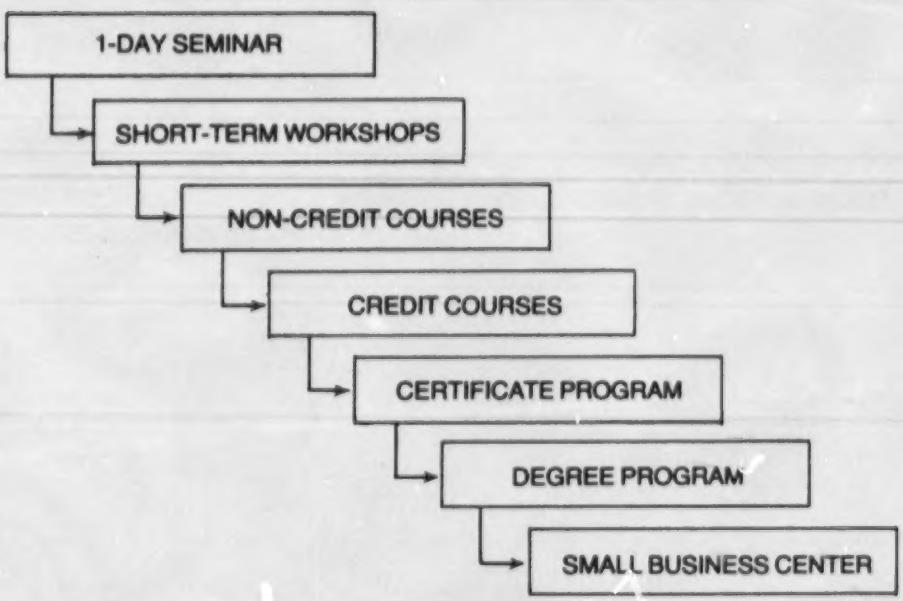
A range of courses and activities for small businesses is offered at Johnson County Community College in Kansas. They offer (1) seminars in conjunction with the SBA for prospective and current small business owners, (2) non-credit courses for small business managers and (3) credit courses in the small business management and marketing areas.

Rock Valley College in Rockford, Illinois has progressed further in their small business development efforts. They offer 9, 15 and 30

credit hour certificate programs and an Associate in Applied Science (AAS) degree program in Small Business. (See Appendix N.)

The advanced development of small business activities in a community college is illustrated by the Small Business Development Center functioning at Brookdale Community College in New Jersey. Here faculty associated with the Center screen requests for assistance from the local business community and provide professional consultation when needed. Contacts with the clients may consist of a telephone conference, a brief visit to the business or an in-depth consultation. When consultation is required a consulting group is organized consisting of three students, a faculty member and a SCORE member. The group visits the business requesting assistance, reviews problem areas and makes recommendations in the form of a final report.

The progress of community college offerings in small business programming may follow a path as depicted below:



In this schematic, the college continues to offer the varied activities and courses under the direction of the Center's leadership. While there is no single, best program for all community colleges, there are many models of successful small business programming throughout the county. The American Association of Community and Junior Colleges (AACJC) through its National Small Business Training Network can supply community colleges with assistance in developing their own, unique responses to local small business needs.

APPENDICES

PAGE

A. Intake Form: Small Business Program 41
B. Bibliography on Small Business and Entrepreneurship 43
C. Statement for Members of Advisory Committees 48
D. Community Indicators Profle Sheet 50
E. Small Business Survey 52
F. Course Feedback Form 53
G. Timetable for Organizing Management Courses 55
H. Checklist for Planning, Printing and Distributing a Brochure 56
I. Certificate 58
J. Small Business Management Seminar 59
K. Evaluation of Subjects and Speakers 61
L. Evaluation of Small Business Management Program 62
M. Small Business Program 63
N. Sample: Associate in Applied Science Degree Program 66

Appendix A

INTAKE FORM*
SMALL BUSINESS PROGRAM

Please Print All Information Requested

1. _____ Last Name _____ First Name _____ Initial

2. _____ Address _____ City/State _____ Zip

3. _____ Home Phone

4. Are you self-employed? ___Yes ___No

5. a) Have you completed high school: ___Yes ___No

   b) Have you attended college: ___Yes ___No

   c) If you graduated from college:

      Which college: _____

      Date of graduation: _____

      Degree: _____

6. How did you learn of the course in small business? (Circle one)

   A. From a friend of relative

   B. From flyers or direct mail

   C. From newspaper announcements

   D. Other source(s): Please specify: _____

7. What was your purpose in applying for admission to this course? (circle one)

   A. To improve the efficiency of your existing business

   B. To help prepare yourself to operate a small business of your own in the future

C. To obtain a general knowledge of small business

D. Not sure of purpose

E. Other; specify: _____

8. If you are not now in business for yourself, how close are you to actual ownership? (Circle one)

A. Looking for capital

B. Seeking right location

C. Ready to begin specific plans

D. Trying to decide if I want to

E. Other; specify: _____

9. If you are already in business, are there particular problems that you are experiencing? _____

_____

- ANSWER EITHER #10 OR #11 -

10. Please describe your current job: _____

_____

11. Please describe your business: _____

_____

*Adapted from intake forms currently in use at Queensborough Community College and Hostos Community College.

Appendix B

BIBLIOGRAPHY ON SMALL BUSINESS AND ENTREPRENEURSHIP

Conducted by

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Appendix C

STATEMENT FOR MEMBERS OF ADVISORY COMMITTEES

When you have decided to help by becoming a member of this committee, you have taken the first step toward decreasing the probability of business failures in your community. Your local community college will appreciate the help you can give in this worthwhile undertaking.

The following sections will give you a general idea of the role you will play in the total effort.

WHAT IS MANAGEMENT TRAINING FOR SMALL BUSINESS OWNERS?

This is an educational program conducted by a community college. Its purpose is to assist owners and managers of small firms to strengthen their position as managers of their businesses. It is a program designed for prospective owners and managers, and is concerned with administrative management and day-to-day operations.

WHAT ARE THE DUTIES OF AN ADVISORY COMMITTEE MEMBER?

You have been asked to become a member of the advisory committee because you are recognized among the business people of your community as a person of ability and experience. In this capacity, your advice and counsel is needed to assist with the organization and promotion of small business management development of your community.

Your help is needed to assist others like yourself, as well as the community college conducting this program to:

1. Decide upon the scope and content of typical subjects for each session of the educational program.

2. Decide on names of speakers or consultants when appropriate.

3. Suggest time and duration of the program.

4. Devise ways and means of promoting course attendance among those in your community most interested in, and in need of, such an educational program.

5. Serve, in general, as a consultant on programming, staffing, and administering, to representatives of the community colleges.

ADDITIONAL INFORMATION

Programming. A typical course will operate for anywhere from 4-16 weeks, one evening per week for two and a half hours. A typical conference, consisting of one or more meetings, usually

covers one management subject. Topical subjects to be discussed will vary from locality to locality, in accordance with the expected types of persons to be enrolled. Some typical subjects which might be included are:

Decision Making--How to Analyze Management Problems
Factors Which Will Determine Success
How to Attract and Hold Qualified Personnel
How to Develop More Business
How to Meet Long-term and Short-term Capital Needs
Legal Aspects of Your Business
Planning for Future Growth
Using Your Accounting Records for Profit
The Use and Abuse of Credit in Business Operations.

Staffing. The various subjects should be presented by specialists proficient in their respective fields. There should be a balance between the practical and theoretical. One individual appointed by the sponsoring community college usually acts as coordinator and is the person with whom you will work.

Administering. The sponsoring community college assumes responsibility for the educational and financial aspects of the course. Usually, the college is assisted by the active cooperation of local organizations or groups, such as the chamber of commerce, local manufacturing associations, retailing and wholesaling associations, and similar business groups. The SBA may also assist in organizing and conducting the educational program.

Appendix D

COMMUNITY INDICATORS
PROFILE SHEET

Area of Information	Source of Information	Information to Include	Record Data	(Notes) Programming Implications
A. Number of Small Businesses	Chamber of Commerce, Local Economic Development Council, Local surveys, Dun and Bradstreet report	Number of small businesses in your service area with: · Less than 5 employees · 6-10 employees · 11-15 employees · Over 15 employees	_____ _____ _____ _____	
B. Education Levels of Small Business Employees	County Superintendent, Local surveys, U. S. Census, data by local tract (extrapolated)	Number of small business employees who have education in the following categories: · 0 - 8th grade · 9th - 12th grade · Associate Degree · Bachelors Degree · More than B.A.	_____ _____ _____ _____ _____	

Appendix D

COMMUNITY INDICATORS
PROFILE SHEET (continued)

Area of Information	Source of Information	Information to Include	Record Data	(Notes) Programming Implications
C. Classification of Small Businesses	Chamber of Commerce, State manufacturing directories, Governor's Office of Economic Development	Number of area's small businesses in the following standard industrial classification categories: · Agriculture Production · Mining · Construction · Manufacturing · Transportation · Wholesale - Retail · Finance · Services · Government · Non-classifiable	_____ _____ _____ _____ _____ _____ _____ _____ _____ _____	
D. Employee Category	Local surveys, Chamber of Commerce, Local banks	Number of area's small business employees in the following categories: · Professional/Technical Mgt. · Clerical and Sales · Services · Farming, Fisheries · Processing · Machine Trades · Benchwork · Structural work · Miscellaneous	_____ _____ _____ _____ _____ _____ _____ _____ _____	
E. (Other)				

Appendix E

SMALL BUSINESS SURVEY

A. Business Improvement Opportunities

Listed below are educational activities which can be offered in one day workshops, seminars of 4-8 hours. Approximate cost for each seminar is $15-$20. A certificate of completion is given at the end of each session. Please indicate your interest by circling the appropriate response.

		Definitely Attend	Maybe Attend	Would Not Attend
1.	Energy conservation measures	1	2	3
2.	Legal concerns for business.	1	2	3
3.	Advertising and promotion in business	1	2	3
4.	Loss prevention	1	2	3
5.	Merchandise control . .	1	2	3
6.	Managing personnel . .	1	2	3
7.	Record keeping	1	2	3
8.	OSHA	1	2	3
9.	Other (Specify:_____)	1	2	3
10.	Other (Specify:_____)	1	2	3

B. Scheduling

Place a check mark ( ) before the time when it would be most convenient for you to attend the above workshops.

___ Monday-Thursday evenings; 6:00 p.m.-10:00 p.m.
___ Friday evening; 6:00 p.m.-10:00 p.m.
___ Saturday; 9:00 a.m.-4:00 p.m.
___ Sunday; 1:00 p.m.-5:00 p.m.

C. Advisory Meeting

For activities where great interest has been indicated, college staff would like to have a short meeting with business people like you for the purpose of discussing what you need to know. Check the box if you'd like to participate at a time convenient to you.

__ Yes, I would like to attend.

D. More Information

If you would like to receive more information on these business improvement activities, please check the box and we will place you on our mailing list.

__ Yes, I would like more information.

E. Name:_____
Address:_____
Telephone Number:_____

58

Please return this form in the enclosed envelope.

ELGIN COMMUNITY COLLEGE

1700 Spartan Drive, Elgin, Illinois 60120

Community College District 509

Course:_____ Date:_____

In order to prepare future training programs, we ask you to answer this questionnaire. Please do not sign your name - be very frank in your answers.

In general, how would you rate this program?	Excellent..... ☐ Good..... ☐ Fair..... ☐ Poor..... ☐ Very Poor..... ☐	Was the program: Too long..... ☐ About right.. ☐ Too short.... ☐	Was the program: Too advanced.... ☐ About right..... ☐ Too elementary.. ☐

Rate the workshop by placing an "X" along the continuums.

1. How well was the workshop organized?

(Well organized) |_____|_____|_____|_____| (Lacked organization)

2. How would you rate the presentor?

(Excellent) |_____|_____|_____|_____| (Poor)

3. How much material was presented?

(Enough to meet your needs) |_____|_____|_____|_____| (Too little to meet your needs)

4. Were handout materials adequate and supportive of the content?

(Very adequate) |_____|_____|_____|_____| (Inadequate)

5. How much do you feel you learned?

(More than anticipated) |_____|_____|_____|_____| (Less than expected)

6. Will the material be useful to you on the job?

(Yes, very) |_____|_____|_____|_____| (No, not very)

7. Were the facilities comfortable?

(Yes) |_____|_____|_____|_____| (No)

How were you informed about this program?

- Received brochure by direct mail..... ☐
- Received brochure from another person..... ☐
- Informed by another person in writing or verbally... ☐
- Saw newspaper release..... ☐
- Saw magazine article or newsletter notice..... ☐
- Some other conference..... ☐
- Inquired at college about training available..... ☐

Should any new training programs be developed in this general subject?
If so, what?

How could this program be improved?

Additional comments

Appendix G

TIME TABLE FOR

ORGANIZING MANAGEMENT COURSES*

To Begin in October	
Middle of May	Discussion of plans and the establishment of beginning date by representatives of the community college and the Small Business Administration. Consideration of prospective members for the advisory committee.
Early June	Meeting of the advisory committee to discuss the program, prospective speakers and promotional plans; and to fix the definite starting date, day of week, length of session, best location for conducting the course, and so on.
Middle of September	Second meeting of advisory committee. This meeting is primarily for the purpose of announcing the beginning of the promotional campaign. Printed brochures describing the course are to be distributed to advisory committee members. Specific plans for members' activities are to be completed, such as their talking with individuals and to business groups to encourage enrollment. First mailing to prospective enrollees is to be made. New releases are sent to newspapers, radio and TV stations. All SBA Aids and other materials should be ordered which are to be distributed to class members during the entire course.
End of September	Second mailing to be made, if necessary. Second story to be released to newspapers, radio and TV stations.

*The same kind of planning is usually needed for conferences and workshops.

Appendix H

CHECKLIST FOR

PLANNING, PRINTING, AND DISTRIBUTING A BROCHURE

The pages of a brochure will be determined by the size of paper used. For example, a standard size sheet (8½" x 11") will make a two-fold pamphlet with six pages. This is the size most commonly used.

PLANNING A BROCHURE

In planning a brochure, you should check the points below so that no essential information is omitted. You may not wish to use all of the items suggested or you may wish to substitute others of your own. The order in which the items are used also may vary.

Page 1 (Cover): Announcement

_____ Title of course, conference, or workshop
_____ Name of sponsoring institutions
_____ Name of Small Business Administration as cosponsor
_____ Seal of either the sponsor or co-sponsor, if desired
_____ Date of meeting, including day of week
_____ Time of meeting
_____ Location
_____ Number of sessions
_____ Art (appropriate illustrations)

Page 2 (Reverse of cover): Promotional Information

_____ Purpose of program
_____ Who should attend
_____ Enrollment information, including limitations; deadline for registering; fees, if any; and place of registration
_____ Parking facilities available
_____ Location (map, if needed)

Page 3: Schedule and Curriculum

_____ Date, including day of week - same as on cover
_____ Time: In addition to hour of meeting, indicate number of weeks and hours in course, or when conference or workshop will conclude.
_____ Location: Repeat and give room number, building.
_____ Subject titles and brief description
_____ Name of lecturer or instructor and his/her title

Page 4: Registration Form

If a two-hold pamphlet is used and page 4 is needed for a continuation of the schedule, a separate registration form should be considered. That form should include the following information:

_____ Title and date of program
_____ Registration fee
_____ Name, address, and telephone number of registrar or coordinator to whom check should be sent.
_____ A brief statement concerning refund policy.

In addition the form should contain blanks for the following:

_____ Name and position of registrant
_____ Name of business firm
_____ Business address
_____ Telephone number of business
_____ Type of business
_____ Number of employees

Page 5 (Reverse of page 4): Self-Mailer

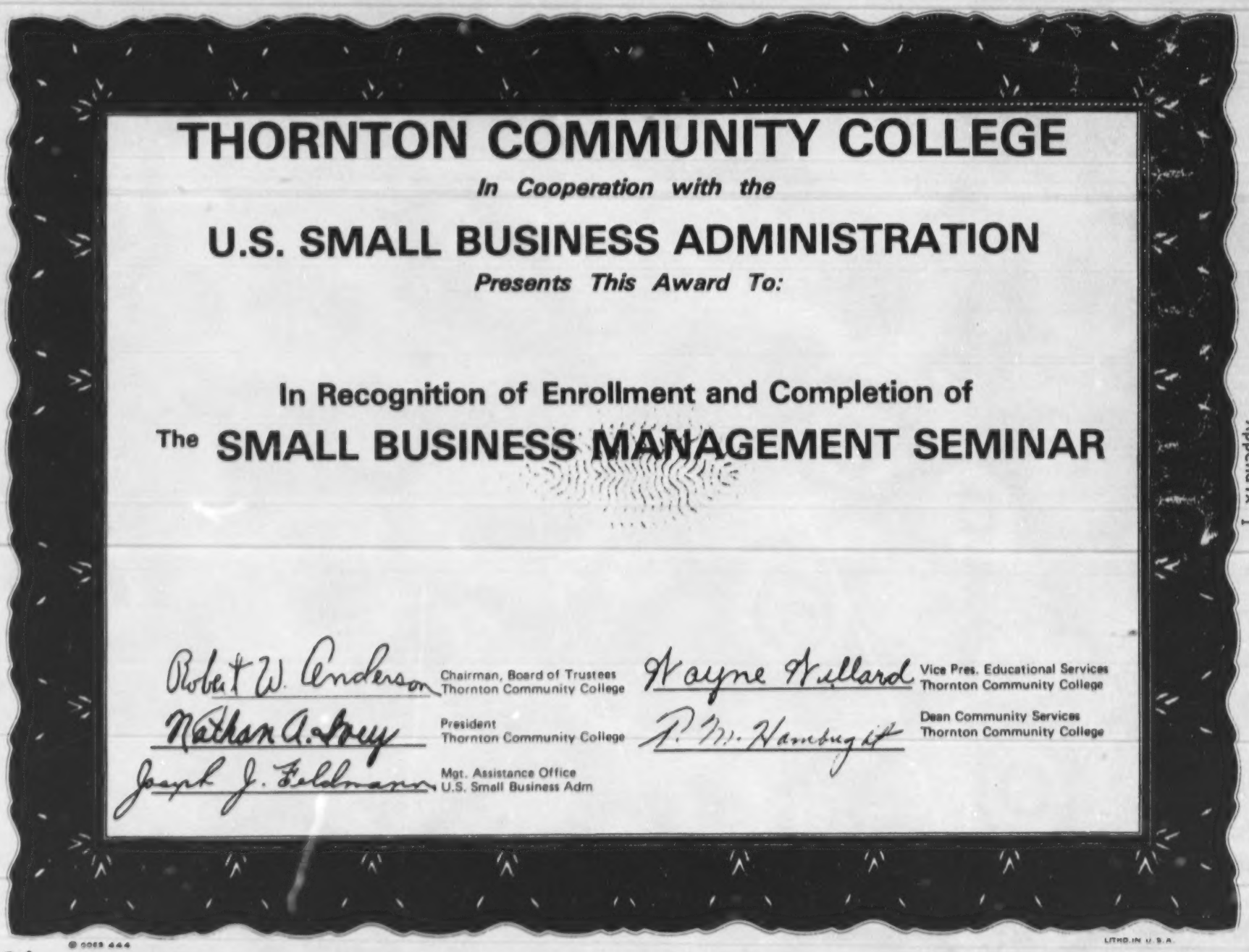
If a self-mailer is used, it should be arranged so as to fall on the reverse side of the registration form and at the end of the form, so no valuable information is lost when the form is detached.

If a self-mailer is not preferred, this space may be used for additional publicity or left blank. If used, remember to:

_____ Print return address of institution offering the training
_____ Print postal mailing permit number

Page 6 (Reverse of page 3): Miscellaneous

Page 6 may be used for any supplemental information not included elsewhere, such as a brief biography of the instructors or leaders; or the page may be left blank.



THORNTON COMMUNITY COLLEGE

In Cooperation with the

U.S. SMALL BUSINESS ADMINISTRATION

Presents This Award To:

In Recognition of Enrollment and Completion of

The **SMALL BUSINESS MANAGEMENT SEMINAR**

Robert W. Anderson — Chairman, Board of Trustees, Thornton Community College

Nathan A. Levy — President, Thornton Community College

Joseph J. Feldmann — Mgt. Assistance Office, U.S. Small Business Adm

Wayne Willard — Vice Pres. Educational Services, Thornton Community College

P. W. Hamburg — Dean Community Services, Thornton Community College

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Appendix J

SMALL BUSINESS MANAGEMENT SEMINAR

Thornton Community College in cooperation with the U. S. Small Business Administration

January 26 - March 2 - 7:30-9:30 p.m. Room 3101

Tuesday, January 26

Speaker	Mr. C. R. VanderVeen, Business Counselor General Business Services, Glenwood, IL
Topic	"The Pitfalls in Managing a Small Business"

Tuesday, February 2

Speaker	Mr. Conrad Sweet, Proprietor, Toni Lavan Realty South Chicago Heights, IL
Topic	"Small Business Location & Layout"

Tuesday, February 9

Speaker	Mr. Norbert Dudek, Vice President, Chicago Title Inc.
Topic	"Sales and Marketing in Business"

Tuesday, February 16

Speaker	Representative of H. R. Block, Riverdale, IL
Topic	"Federal and State Income Tax for Small Business"

Tuesday, February 23

Speaker	Mr. John Eggert, Proprietor, Eggert Insurance Agency, Inc., Lansing, IL
Topic	"Insurance for Safeguarding Your Business"

Tuesday, March 2

Speaker	M. Dolores A. LaValle, Management Assistant, SBA
Topic	"What the Small Business Administration Can do For You

Appendix K

EVALUATION OF SUBJECTS AND SPEAKERS

Our goal is to present subjects which are helpful to small business people and to engage speakers who are able to share their knowledge and experience. You can help us meet that goal. Write the names of each subject and speaker on the appropriate lines. Please circle the rating which you feel each subject and speaker deserves. Do not sign this sheet.

SUBJECT	RATING	SPEAKER	RATING
_____	Superior Excellent Good Fair Poor	_____	Superior Excellent Good Fair Poor
_____	Superior Excellent Good Fair Poor	_____	Superior Excellent Good Fair Poor
_____	Superior Excellent Good Fair Poor	_____	Superior Excellent Good Fair Poor
_____	Superior Excellent Good Fair Poor	_____	Superior Excellent Good Fair Poor
_____	Superior Excellent Good Fair Poor	_____	Superior Excellent Good Fair Poor
_____	Superior Excellent Good Fair Poor	_____	Superior Excellent Good Fair Poor

Appendix L

(May Be Used for Evaluating Management Courses and Seminars)

EVALUATION OF SMALL BUSINESS MANAGEMENT PROGRAM

Title of Program/Course_____ Date Held:_____

Your frank reaction to this program can help in planning future training. It will, therefore, be appreciated if you will complete the following evaluation and return to the instructor before leaving the classroom.

DO NOT SIGN THIS FORM.

		Yes	No
1.	Was the instructor's approach to the subject practical rather than theoretical?	____	____
2.	Can the knowledge acquired in this training be applied to your current or future business?	____	____
3.	Were any subjects inadequately covered? If so, please list on the reverse side of this sheet.	____	____
4.	Were any subjects not helpful? If so, should they be omitted from future training? If your answer is "Yes," please list subjects on the reverse side.	____	____
5.	Were any subjects omitted that you feel should be included in subsequent sessions? If so, please list on other side.	____	____
6.	Do you believe the same course should be offered to other groups?	____	____
7.	Would you recommend this course to your business associates?	____	____
8.	Was the time of the course (month, day, hour) convenient?	____	____
9.	Were the following helpful:	____	____
	(a) Case Studies	____	____
	(b) Discussion Groups	____	____
	(c) Publications	____	____
	(d) Visual Aids and Films	____	____

10. Which item in question 9 was the most helpful_____

11. Which item in question 9 was the least helpful_____

12. Circle one rating for this course. Excellent Good Fair Poor

13. List the two topics that you found the most helpful.

_____

_____

14. If you have suggestions for improving this course or suggestions for future seminars, please write them on the back of this sheet.

DO NOT SIGN THIS FORM

Appendix M

SMALL BUSINESS PROGRAM

YEAR ONE: "Business Records and Accounts"

1. Stimulating Interest In Small Business Management
2. Need For Small Business Records
3. Measure Of Small Business Family Progress And Uses Of Small Business Home Records
4. Importance of Inventories
5. Keeping Small Business Accounts Current
6. Balance Sheet And Monthly Summary
7. Cash Flow And Cash Flow Projections
8. Employers' Records; Social Security And Income Tax
9. Unemployment Compensation, Workmen's Compensation And Fair Labor Standards Act, OSHA And Safety Considerations
10. Employer-Employee Relations
11. The Depreciation Schedule
12. Income Tax Management
13. End Of Year Inventory
14. Closing The Record Books For Analysis

YEAR TWO: Small Business Analysis

1. Calculating Income And Social Security Taxes
2. Measures Of Small Business Profit
3. Measures Of Small Business Size
4. General Interpretation Of The Analysis
5. The Importance Of Inventories
6. Analyzing The Customer Service Department
7. Analyzing The Size Of Business
8. Analyzing Mechanization, Labor, Equipment And Building Costs
9. Analyzing Major Department Efficiencies
10. Evaluation Of The Small Business
11. Income Tax Planning And Management
12. Closing The Small Business Account Book For Analysis

YEAR THREE: Small Business Reorganization

1. Attributes Of Successful Small-Business Entrepreneurs
2. Determining The Most Profitable Level Operation
3. Selection Of Departments
4. What Do Two Years Of Records Mean
5. Evaluating The Customer Service Departments
6. Evaluating The Major Departments
7. Evaluating Overhead And General Business Costs
8. Maximizing Income
9. Maximizing Income (continued)
10. Maximizing Income (continued)
11. Site, Buildings, Merchandise Handling
12. Planning Transitional Stages

BUSINESS OPERATOR'S FILE

NAME OF BUSINESS _____

ADDRESS _____
Street City Zip

PHONE NUMBER HOME _____ BUSINESS _____

NAME OF OWNER(S) _____

TYPE OF BUSINESS _____

NUMBER OF EMPLOYEES _____
Full Time Part Time Total

MEMBERS OF FAMILY (OTHER THAN OWNER) _____
Name Relationship

_____ _____
Name Relationship Name Relationship

_____ _____
Name Relationship Name Relationship

LENGTH OF TIME BUSINESS OPERATED BY PRESENT OWNER _____

_____

_____

DATE STARTED SMALL BUSINESS MANGEMENT PROGRAM _____

CONDITION OF BUSINESS STARTING _____

APPEARANCE OF BUSINESS STARTING _____

RECORD KEEPING SYSTEM STARTING _____

OPERATOR'S ATTITUDE STARTING _____

GOALS OF BUSINESS/FAMILY STARTING _____

_____

INSTRUCTOR'S COMMENTS _____

_____

_____

SMALL BUSINESS ANALYSIS AGREEMENT

As a cooperator in the Small Business Management Analysis Program, I hereby agree to the following provisions:

1. That I will use a record keeping system that is adequate for business analysis during the year and will keep these records current to the best of my ability.
   a. Inventories
   b. Cash expenses and receipts
   c. Non-business assets and liabilities

2. That I will make a tuition payment of $15.00 per month.

3. That I will attend group meetings of the Small Business Management Program regularly.

4. That I will submit my records for analysis in January of the following year.

As a representative of the Small Business Management Department, in cooperation with Lake Region Junior College, I agree to provide the following to the small business cooperator:

1. Assistance with establishing beginning inventories, and all other beginning entries.

2. To check the cooperator's records periodically for accuracy and completeness.

3. To assist the cooperator with the preparation of necessary information for income tax purposes at the end of the year.

4. At the end of the year, to prepare such necessary close-out summaries and other additional forms as will be required by the analysis center.

5. To submit the records to the analysis center.

6. To provide the cooperator with a copy of the completed analysis from his own business. To discuss the results of this analysis, particularly, as to how it may be used to further improve the business.

7. To keep all matters pertaining to the business strictly confidential.

Date_____ _____
(Small Business Cooperator)

Received $_____ _____
(Small Business Management Instructor)

Appendix N

SAMPLE: ASSOCIATE IN APPLIED SCIENCE DEGREE PROGRAM
ROCK VALLEY COLLEGE - 1981
ROCKFORD, ILLINOIS

FIRST YEAR

Fall Semester		Spring Semester	
BUS 101 - Introduction to Business	3	ENGL 105 - Business Writing	3
BUS 103 - Business Mathematics	3	MANGT 273 - Small Business Management	3
BUS 170 - Human Relations in Business	3	MKTG 260 - Marketing	3
ACCTG 108 - Business Accounting	3	SPCH 131 - Fundamentals of Speech or General Education Requirement (Elective)	3
ENGL 100 - Vocational Communications	3	BUS 105 - Cons Econ & Pers Fin or Business Elective or Elective	3
	15	**MANGT 275 - Small Bus Seminar	1
			16

SECOND YEAR

Fall Semester		Spring Semester	
BUS 201 - Business Law I	3	**MANGT 275 - Small Business Seminar	1
MANGT 270 - Principles of Management	3	MANGT 276 - Independent Study in Small Business Management or MKTG 261 - Prin of Retailing or MKTG 264 - Mrchnds & Sales Prom or MKTG 276 - Prin of Purch I or MANGT 278 - Office Management or Business Elective	3
**MANGT 275 - Small Business Seminar	1		
MANGT 276 - Independent Study in Small Business Management or Business Elective or Elective	3	MANGT 277 - Internship in Small Business Management or Business Elective or Elective	3
MANGT 277 - Internship in Small Business Management or Business Elective or Elective	3	MKTG 265 - Salesmanship	3
General Education Reqirement	3	MKTG 266 - Prin of Advertising	3
	16	General Education Requirement	3
			16

** = May be repeated up to 3 times.

Appendix N

Sample Mini-Certificate Programs
Rock Valley College - 1981
Rockford, Illinois

Basic Small Business Certificate (9 Hours)

ACCTG 108 - Business Acccounting	3
MANGT 273 - Small Business Management	3
MKTG 266 - Principles of Advertising	3

Small Business Retailing Certificate (15 Hours)

MANGT 270 - Principles of Management	3
MANGT 273 - Small Business Management	3
MKTG 260 - Marketing	3
MKTG 261 - Principles of Retailing	3
MKTG 266 - Principles of Advertising or BUS 170 - Human Relations in Business	3

Small Business Management Certificate (29-30 Hours)

ACCTG 108 - Business Accounting	3
BUS 101 - Introduction to Business	3
BUS 170 - Human Relations in Business	3
BUS 201 - Business Law I	3
MANGT 270 - Principles of Management	3
MANGT 273 - Small Business Management	3
MANGT 275 - Small Business Seminar	2-3
MANGT 276 - Independent Study in Small Business Management	3
MKTG 266 - Principles of Advertising	3
MKTG 260 - Marketing or Business Elective	3